

# **SiteManager** **Training Manual**



Module A  
Chapter 1

**Contract Administration**  
**Contract Records**

Section A-2-8-1

## **Key Dates Adding, Modifying and Deleting**

Student's Version

Indiana Department of Transportation

December 2007, Version 3.7b

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# Key Dates

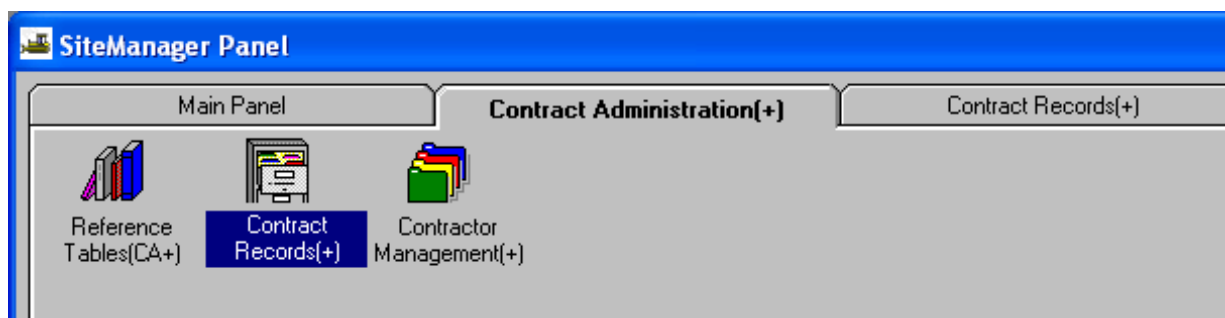
A key date is a date that occurs once in the life of a Contract. When a key date occurs, a notification is sent to a selected recipient. SiteManager adds a set of default Key Dates automatically to each new Contract. In this window, a user may add a new Key Date, schedule a Key Date, enter the date of the actual occurrence and delete Key Dates that will not be used for a selected contract.

The following table of Key Dates comes from the Contract Finalization Procedure:

Applies to Contract	Key Date	User Who Populates Actual Date	Required to Activate	Required to Finalize	Recipient
<input type="checkbox"/>	Last Day of Work (105.15)	PE/S	N	Y	Area Engineer
<input type="checkbox"/>	Final Acceptance (105.15)	AE	N	Y	District Office Review Officer
<input type="checkbox"/>	First Day of Work (no ref.)	PE/S	N	Y	Area Engineer
<input type="checkbox"/>	PE/S Contract Review is Complete	PE/S	N	Y	District Review Officer
<input type="checkbox"/>	Substantial Completion (101.59)	PE/S	N	Y	District Review Officer
<input type="checkbox"/>	Pre-final Inspection	PE/S	N	Y	norecip
<input type="checkbox"/>	Punch List Items Completed (108.09)	PE/S	N	Y	Area Engineer
<input type="checkbox"/>	Sod Maintenance Expired (621.10)	PE/S	N	Y	norecip
<input type="checkbox"/>	Sod Repaired (621.10)	PE/S	N	Y	norecip
<input type="checkbox"/>	Failed Material Replaced (105.03)	PE/S	N	Y	norecip
<input type="checkbox"/>	Final Inspection (105.15)	PE/S	N	Y	Area Engineer
<input type="checkbox"/>	Temp Traffic Contrl Devices Rem (108.09)	PE/S	N	Y	Area Engineer
<input type="checkbox"/>	Authorized to Remove Signs (108.09)	PE/S	N	Y	Area Engineer



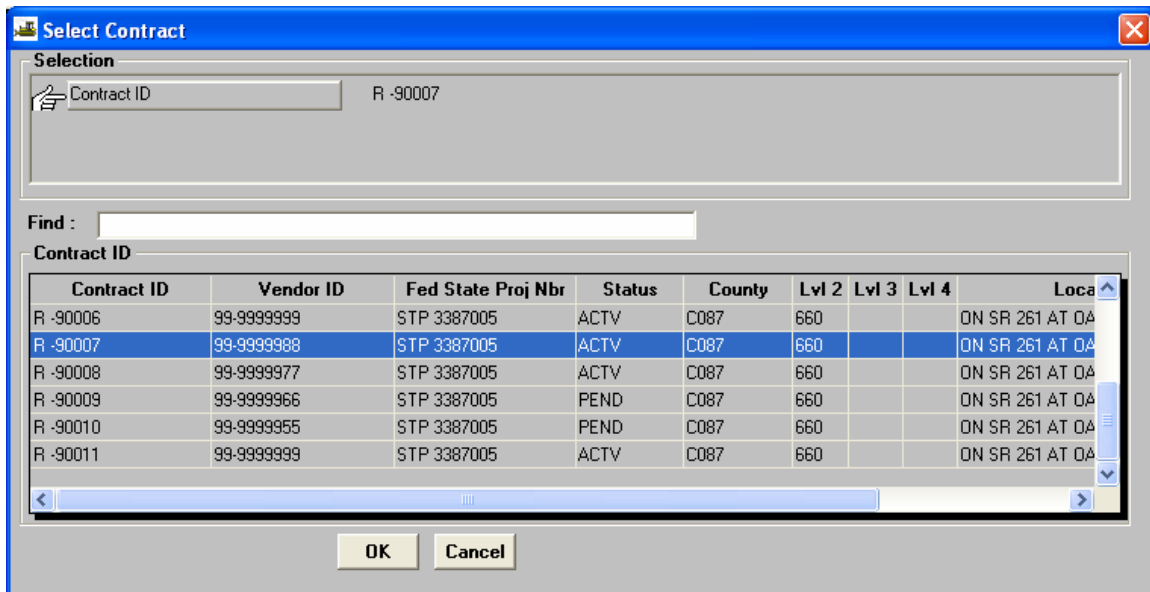
“Double-click” on the **Contract Administration (+)** icon located on the Main Panel.



“Double-click” the **Contract Records (+)** icon.



“Double-click” on the **Key Dates** icon.



The Select Contract window opens.

The Bottom Panel contains the following columns:

- **Contract ID:** is the identification number assigned to the contract.
- **Vendor ID:** is the INDOT assigned identification number for the Prime Contractor.
- **Fed State Proj Nbr:** is the unique identifier for the project.
- **Status:** column indicates current status of the project, Active, Pending, Complete, or Archived.
- **County:** column shows the county where the majority of the work is located.
- **Lvl 2:** The **Lvl 2** column indicates the District Office administering the contract.
- **Lvl 3:** The **Lvl 3** column is not utilized by INDOT.
- **Lvl 4:** The **Lvl 4** column is not utilized by INDOT.
- **Location Description 1:** the **Location Description 1** column is the description of the actual work location.

Use the Scroll or Find, Filter, Sort technique to locate the appropriate contract “Double-click” on the appropriate **Contract ID**.

This step will be skipped if a contract has previously been selected.

**AASHTO SiteManager**

File Edit Services Window Help

**Key Dates**

Contract ID:

Key Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize
Bench Marks	00/00/00	00/00/00	N	Y
Central Office Contract Review Complete	00/00/00	00/00/00	N	N
Contractor Last Day of Work	00/00/00	00/00/00	N	Y
District Contract Review Complete	00/00/00	00/00/00	N	N
Final Acceptance Date	00/00/00	00/00/00	N	Y
First Day of Work	08/01/05	00/00/00	N	Y
Overhead Structure Report	00/00/00	00/00/00	N	Y
Payrolls	00/00/00	00/00/00	N	Y

**Key Date Type:**

**Projected Date:**

**Actual Date:**

**Distribution List:**

**Message Text:**

☐ Required to Activate

☒ Required to Finalize

**Recipient:**

The Key Dates window lists the Key Dates for the selected Contract in the top panel. The data for the selected Key Date is displayed in the bottom panel.

## Adding a Key Date to a Contract

**AASHTO SiteManager**  
File Edit Services Window Help

**Key Dates** **New**

Contract ID: R-90007

Key Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize
Bench Marks	00/00/00	00/00/00	N	Y
Central Office Contract Review Complete	00/00/00	00/00/00	N	N
Contractor Last Day of Work	00/00/00	00/00/00	N	Y
District Contract Review Complete	00/00/00	00/00/00	N	N
Final Acceptance Date	00/00/00	00/00/00	N	Y
First Day of Work	08/01/05	00/00/00	N	Y
Overhead Structure Report	00/00/00	00/00/00	N	Y
Payrolls	00/00/00	00/00/00	N	Y

Key Date Type: Substantial Completion

Projected Date: 00/00/00

Actual Date: 00/00/00

Distribution List:

Message Text:

☐ Required to Activate

☒ Required to Finalize

Recipient:

“Click” on the **New** button located on the toolbar.

**AASHTO SiteManager**  
File Edit Services Window Help

**Key Dates** **New**

Contract ID: R-90007

Key Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize
Final Acceptance Date	00/00/00	00/00/00	N	Y
First Day of Work	08/01/05	00/00/00	N	Y
Overhead Structure Report	00/00/00	00/00/00	N	Y
Payrolls	00/00/00	00/00/00	N	Y
PE/S Contract Review Complete	00/00/00	00/00/00	N	N
Substantial Completion	00/00/00	00/00/00	N	Y
Traffic Signal Report	00/00/00	00/00/00	N	Y
Pile Driving Report	00/00/00	00/00/00	N	N

Key Date Type: Pile Driving Report

Projected Date: Overhead Structure Report

Actual Date: Payrolls

Distribution List: PE/S Contract Review Complete

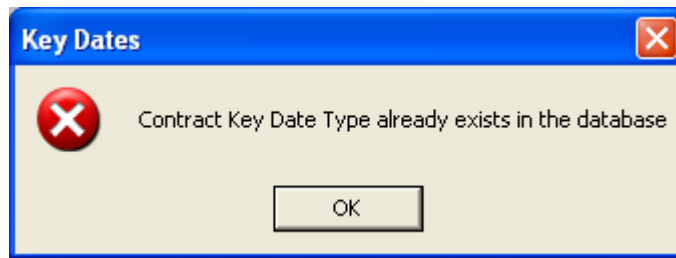
Message Text: Pile Driving Report

☐ Required to Activate

☒ Required to Finalize

Recipient:

“Click” **Key Date Type** drop-down list and select the appropriate **Key Date Type**.



Each key date can be associated to a contact one time. If the key date that is being selected is already associated to the contract, then the “Contract Key Date Type already exists in the database” message will appear.  
 “Click” the **OK** button.

 A screenshot of the "AASHTO SiteManager" application window. The "Key Dates" sub-window is active, showing a form for managing key dates for a specific contract.
 

Contract ID: R-90007

Key Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize
Final Acceptance Date	00/00/00	00/00/00	N	Y
First Day of Work	08/01/05	00/00/00	N	Y
Overhead Structure Report	00/00/00	00/00/00	N	Y
Payrolls	00/00/00	00/00/00	N	Y
PE/S Contract Review Complete	00/00/00	00/00/00	N	N
Substantial Completion	00/00/00	00/00/00	N	Y
Traffic Signal Report	00/00/00	00/00/00	N	Y
Pile Driving Report	00/00/00	00/00/00	N	N

Below the table, there are input fields for the selected "Pile Driving Report" type:

- Key Date Type:** Pile Driving Report (dropdown menu)
- Projected Date:** 07/15/08 (text field)
- Actual Date:** 00/00/00 (text field)
- Distribution List:** (text field)
- Message Text:** (text field)
- Required to Activate:** ☐ (checkbox)
- Required to Finalize:** ☐ (checkbox)
- Recipient:** (text field)

**Projected Date:** The **Projected Date** is the date the key date is targeted to occur.

“Enter” the appropriate date in the **Projected Date** field.

**Actual Date:** The **Actual Date** the event actually occurs. This date must be current or in the past. The Recipient is notified when this date is entered.

**Required to Activate:** **Required to Activate** indicates that a key date must occur before the Contract status can be changed from Pending to Active. A Key Date can not be both Required to Activate and Required to Finalize.

Note: Do not check **Required to Activate**.



**AASHTO SiteManager**  
File Edit Services Window Help

**Key Dates**  
Contract ID: R-90007

Key Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize
Final Acceptance Date	00/00/00	00/00/00	N	Y
First Day of Work	08/01/05	00/00/00	N	Y
Overhead Structure Report	00/00/00	00/00/00	N	Y
Payrolls	00/00/00	00/00/00	N	Y
PE/S Contract Review Complete	00/00/00	00/00/00	N	N
Substantial Completion	00/00/00	00/00/00	N	Y
Traffic Signal Report	00/00/00	00/00/00	N	Y
Pile Driving Report	00/00/00	00/00/00	N	N

Key Date Type: Pile Driving Report  
 Projected Date: 07/15/05  
 Actual Date: 00/00/00  
 Distribution List:   
 Message Text:   
☐ Required to Activate  
☐ Required to Finalize  
 Recipient:

**Required to Finalize:** Required to Finalize indicates that the Actual Date of the Key Date must be populated before the contract can be finalized. These dates support the contract finalization procedure.

“Click” on the Required to Finalize checkbox, if appropriate.

**Distribution List:** will not be utilized by INDOT

**AASHTO SiteManager**  
File Edit Services Window Help

**Key Dates**  
Contract ID: R-90007

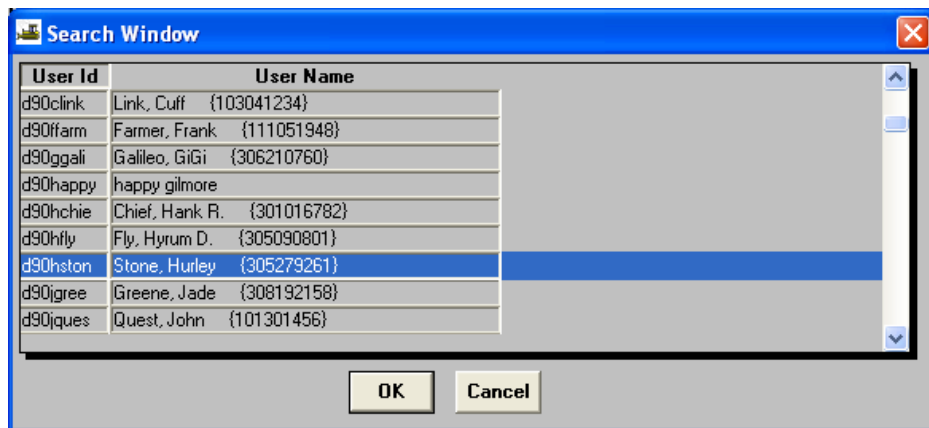
Key Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize
Final Acceptance Date	00/00/00	00/00/00	N	Y
First Day of Work	08/01/05	00/00/00	N	Y
Overhead Structure Report	00/00/00	00/00/00	N	Y
Payrolls	00/00/00	00/00/00	N	Y
PE/S Contract Review Complete	00/00/00	00/00/00	N	N
Substantial Completion	00/00/00	00/00/00	N	Y
Traffic Signal Report	00/00/00	00/00/00	N	Y
Pile Driving Report	07/15/05	00/00/00	N	N

Key Date Type: Pile Driving Report  
 Projected Date: 07/15/05  
 Actual Date: 00/00/00  
 Distribution List:   
 Message Text:   
☐ Required to Activ  
☐ Required to Finali  
 Recipient:   
 Search  
 Filter Search  
 Show Details  
 Filter  
 Find  
 Sort

**Recipient:** The **Recipient** is the User ID of a person to be notified that the event has occurred.

“Right Click” in the **Recipient** field.

“Click” on **Search**.



Use the Scroll or Find, Filter, Sort technique to locate the appropriate recipient.

“Double-click” on the appropriate **User Name**.

Key Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize
Final Acceptance Date	00/00/00	00/00/00	N	Y
First Day of Work	08/01/05	00/00/00	N	Y
Overhead Structure Report	00/00/00	00/00/00	N	Y
Payrolls	00/00/00	00/00/00	N	Y
PE/S Contract Review Complete	00/00/00	00/00/00	N	N
Substantial Completion	00/00/00	00/00/00	N	Y
Traffic Signal Report	00/00/00	00/00/00	N	Y
Pile Driving Report	07/15/05	00/00/00	N	N

Key Date Type: Pile Driving Report  
 Projected Date: 07/15/05  
 Actual Date: 00/00/00  
 Distribution List:  
 Message Text: Pile Driving Report is being submitted.

**Message Text:** **Message Text** is a message that will be sent to the Recipient via a SiteManager InBox notification when the Actual Date is populated.

“Enter” a message in the **Message Text** field.

“Click” the **Save** button located on the tool bar.

## Modifying a Key Date

**AASHTO SiteManager**

File Edit Services Window Help

**Key Dates**

Contract ID: R-90007

Key Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize
Central Office Contract Review Complete	00/00/00	00/00/00	N	N
Contractor Last Day of Work	00/00/00	00/00/00	N	Y
District Contract Review Complete	00/00/00	00/00/00	N	N
Final Acceptance Date	00/00/00	00/00/00	N	Y
First Day of Work	08/01/05	00/00/00	N	Y
Overhead Structure Report	10/30/06	10/02/06	N	Y
Payrolls	00/00/00	00/00/00	N	Y
PE/S Contract Review Complete	00/00/00	00/00/00	N	N

Key Date Type: Overhead Structure Report

Projected Date: 10/30/06

Actual Date: 10/02/06

Distribution List:

Message Text:

Required to Activate: ☐

Required to Finalize: ☒

Recipient:

Search

Filter Search

Show Details

Filter

Find

Sort

Show Filter/Sort

Select a Key Date to modify by “clicking” on the appropriate Key Date in the **Key Date Type** field in the top panel.

In the bottom panel:

**Projected Date:** The **Projected Date** is the date the Key Date is targeted to occur.

“Enter” the appropriate date in the **Projected Date** field, if applicable.

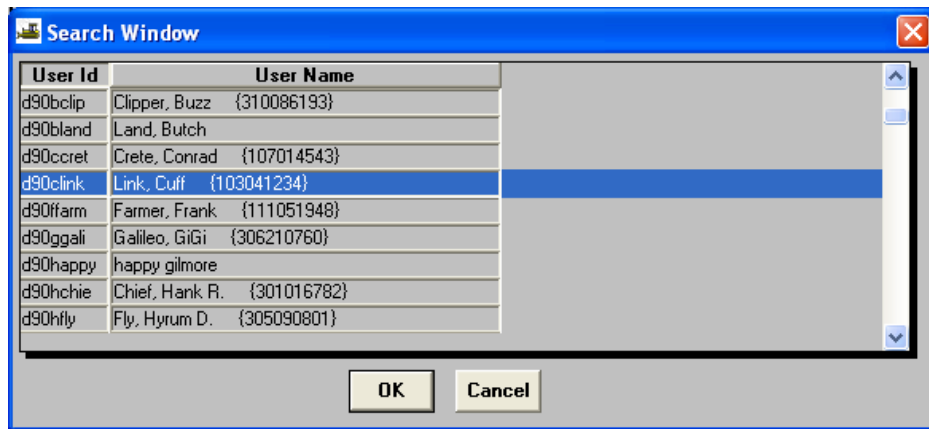
**Actual Date:** The **Actual Date** the event actually occurs. This date must be current or in the past. The Recipient is notified when this date is entered.

“Enter” the appropriate date in the **Actual Date** field, if applicable.

**Recipient:** The **Recipient** is the User ID of a person to be notified that the event has occurred.

“Right Click” in the **Recipient** field.

“Click” on **Search**.



“Double-click” on the **User ID** of a person to be notified that the event has occurred.

Key Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize
Central Office Contract Review Complete	00/00/00	00/00/00	N	N
Contractor Last Day of Work	00/00/00	00/00/00	N	Y
District Contract Review Complete	00/00/00	00/00/00	N	N
Final Acceptance Date	00/00/00	00/00/00	N	Y
First Day of Work	08/01/05	00/00/00	N	Y
Overhead Structure Report	10/30/06	10/02/06	N	Y
Payrolls	00/00/00	00/00/00	N	Y
PE/S Contract Review Complete	00/00/00	00/00/00	N	N

**Key Date Type:** Overhead Structure Report  
**Projected Date:** 10/30/06  
**Actual Date:** 10/02/06  
**Distribution List:**   
**Message Text:** Overhead Structure Report Submitted  
☐ Required to Activate  
☒ Required to Finalize  
**Recipient:** d90clink

**Message Text:** Message Text field contains information about the Key Date that is sent to the Recipient via the SiteManager In-Box when the Actual Date is populated and saved. “Click” into the **Message Text** field and “enter” a message that will be sent to the Recipient.

“Click” the **Save**  button located on the toolbar.

## Deleting a Key Date

**AASHTO SiteManager**

File Edit Services Window Help

**Key Dates** Delete

Contract ID: R-90007

Key Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize
Bench Marks	00/00/00	00/00/00	N	Y
Central Office Contract Review Complete	00/00/00	00/00/00	N	N
Contractor Last Day of Work	00/00/00	00/00/00	N	Y
District Contract Review Complete	00/00/00	00/00/00	N	N
Final Acceptance Date	00/00/00	00/00/00	N	Y
First Day of Work	08/01/05	00/00/00	N	Y
Overhead Structure Report	07/15/05	07/03/05	N	Y
Payrolls	00/00/00	00/00/00	N	Y

Key Date Type: Bench Marks

Projected Date: 00/00/00

Actual Date: 00/00/00

Distribution List:

Message Text:

☐ Required to Activate

☒ Required to Finalize

Recipient:

Select a Key Date to delete by “clicking” on the appropriate Key Date in the **Key Date Type** field in the top panel.

“Click” on the **Delete**  button located on the toolbar.

**AASHTO SiteManager**







































Do you wish to delete this Contract Key Date?

Yes No

“Click” the Yes button.

**AASHTO SiteManager**

File Edit Services Window Help

## A-2-8-1 Group Exercise

The contractor began work on 7/16/06 on R -90004. This information needs to be documented in the Key Dates.

Log into SiteManager as: update

Password: pass

“Double-click” on **Contract Administration**

“Double-click” on **Contract Records**

“Double-click” on **Key Dates**

“Click” the **Open** button

Contract ID	Select	<u>R -90004</u>
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Key Date	Click	<u>First Day of Work</u>
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Actual Date	Enter	<u>07/16/06</u>
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“Click” on **Save** located on the toolbar

“Click” on **Close** located on the toolbar